



ADVISOR'S GUIDE FOR PLANNED GIVING

Gifts from Wills and Trusts

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city, and other identifying details be used. To name Colorado College in your client's will or trust please use the following suggested language:

Residual Gift Language

A residual bequest comes to us after your client's estate expenses and specific bequests are paid:
I give and devise to Colorado College, the charitable, tax-exempt organization located in Colorado Springs, Colorado, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Gift Language

Naming Colorado College as a beneficiary of a specific amount from your client's estate is easy:
I give and devise to Colorado College, the charitable, tax-exempt organization located in Colorado Springs, Colorado, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Gift Language

Colorado College or its affiliates can be named as a contingent beneficiary in your client's will or personal trust if one or more of their specific bequests cannot be fulfilled:
If (insert name) is not living at the time of my demise, I give and devise to Colorado College, the charitable, tax-exempt organization located in Colorado Springs, Colorado, the sum of \$ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities

Please use the following instructions when transferring your client's securities to Colorado College:

For Account of:

Colorado College
Raymond James & Associates DTC #: 0725
Account #: 24455142
Colorado College Tax ID #: 84-0402510

Financial Advisor:

Todd Metzger
Raymond James & Associates 102 N. Cascade Ave., Suite 600 Colorado Springs, CO 80903
(719) 632-0266
Fax (719) 632-0106

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As you complete your client's transfer, please contact Kathleen Bauer, Manager of Gifts and Acknowledgements, at (719) 389-6354 or kathleen.bauer@coloradocollege.edu.

For gifts of mutual funds or other investments, please contact the Office of Gift Planning.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation

Please have your client contact his/her plan provider for a change of beneficiary form. Once they have completed the form, please send a copy to Stephany Marreel, Director of Gift Planning at (719) 389-6231 or stephany.marreel@coloradocollege.edu.